



Washington Metropolitan Area Transit Authority

SmartBenefits® Program Update

Montgomery County Employers Meeting
December 2, 2010



Purpose

- Background
- SmarTrip® Update
- SmartBenefits® Review
- SmartBenefits® AnyTime
- Q & A





Background

- SmartBenefits® allows employers to assign transit and parking benefits via the SmarTrip® card
- More than 200,000 participants
- Two significant changes to the program will have impact on riders in the coming months
 - ARRA – transit benefit reverts to \$120 from \$230 per month
 - IRS mandate requires separate accounts for transit and parking benefits



SmarTrip® Update

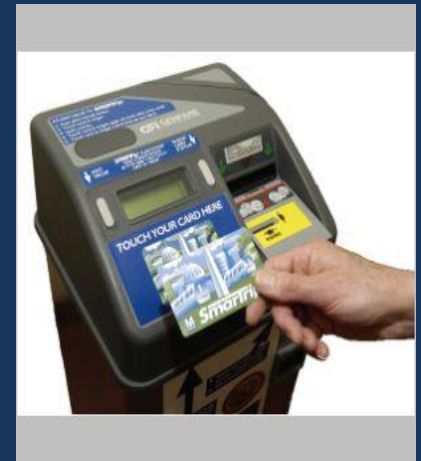
- SmarTrip® Website
 - View transactions and card balance
 - Card must be registered for access to information
- Fare incentives for using SmarTrip®
- 7-Day regional bus pass on SmarTrip®
- MTA introduces CharmCard®





7-Day Regional Bus Pass On SmarTrip®

- Good 7 consecutive days from first use
 - Full fare \$15
 - Senior / Disabled \$7.50
- Unlimited rides on regular Metrobus, ART, DASH, CUE, Fairfax Connector, DC Circulator, Ride On and TheBus
- Add pass at SmarTrip® CPOS (compact point of sale)
 - Metro-operated sales offices
 - Regional transit stores
 - Select CVS, Giant Food and other merchants
- Maximum of two bus passes at a time
- December 31 – last paper bus pass





MTA CharmCard®

- Rechargeable card
- Holds \$200 in value vs. SmarTrip® \$300
- Stored value can be used:
 - Metrobus, Metrorail and regional bus systems
- MTA passes on CharmCard® for MTA systems only





SmartBenefits® Changes

- American Recovery and Reinvestment Act (ARRA)
 - January 1, 2011, transit benefits likely to return to \$120 from \$230
- Metro's communications efforts
 - Letters to delegation
 - eAlerts
 - Social media
 - Bus and rail posters
 - Paid newspaper ads



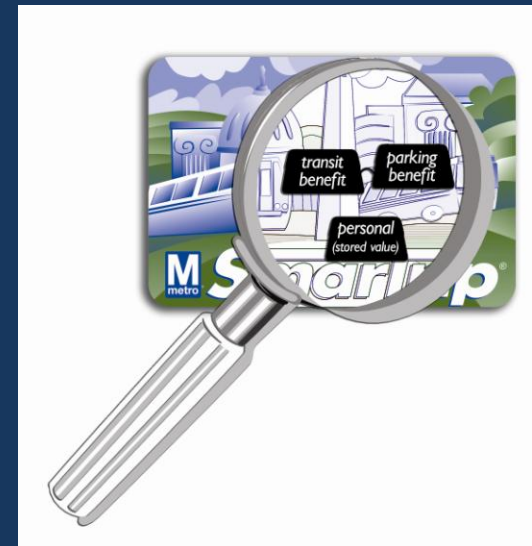
ARRA Employer Preparation

- Employers must update SmartBenefits® amounts (categories) by December 15 for January benefit
- Inform employees of the changes
- Employees must change amount in van pool and transit services allocation account
 - Cutoff dates vary depending on transit service



SmartBenefits® Changes – IRS Mandate

- Held focus groups for employer input
- Employer seminars to review January 2011 changes
- SmarTrip® card MUST be registered
- SmartBenefits® AnyTime



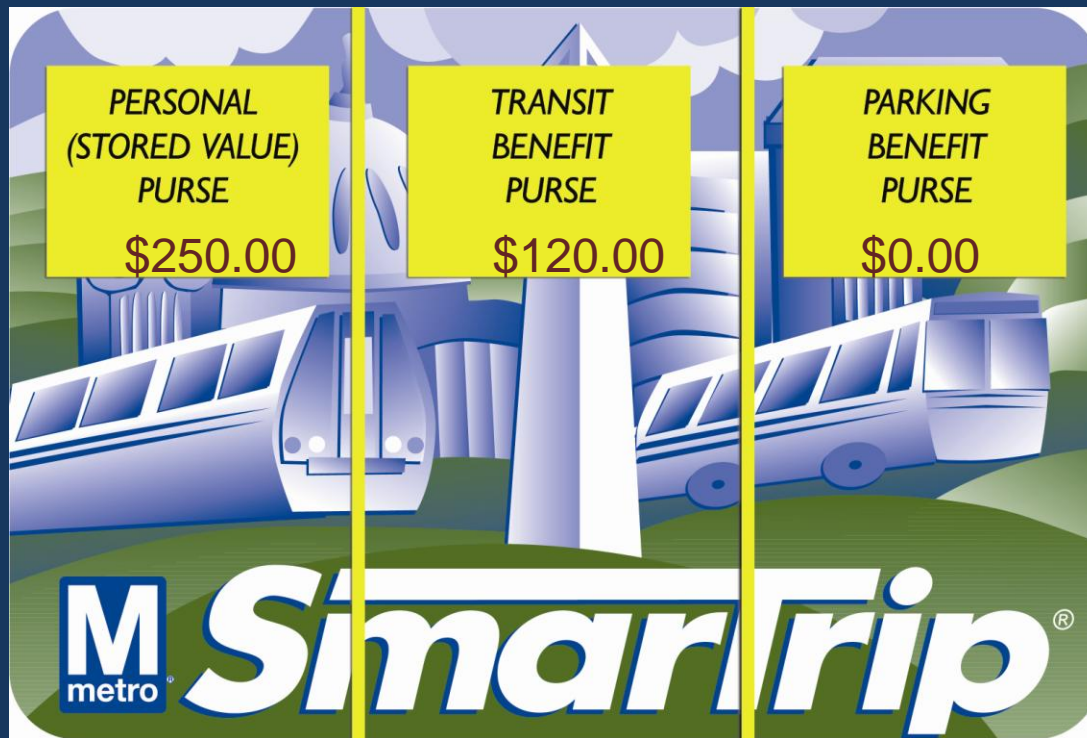


SmartBenefits® Transition Plan

- Pilot 1: November 2010 Metro staff
- Pilot 2: Mid November with 100 FAA employees
- Upon successful completion of Pilots 1 and 2
 - Deploy remainder of FAA employees in December
 - 6,400 FAA employees will pick up January 2011 benefits via Autoload
- Next customer group provides both transit and parking
- Remaining 220,000 employees will migrate over four to six months
- Provide four to six weeks advance notice to employer



New SmartBenefits® Process



- Transit fare payments will be paid from transit benefit purse first.
- Stored value funds used when transit or parking funds are exhausted.
- Parking purse for paying Metro parking fees only.



New SmartBenefits® Employee Process

- After employers SmartBenefits® order cutoff date
 - Between 16th and last day of the month
- Employee does the following before month end
 - Tap SmarTrip® card to target on Metrorail farecard machine to upgrade the card format
 - Tap card to rail faregate or bus farebox to load SmartBenefits® product information
- New benefit amounts will be available on the first day of the month. Just tap card to faregate or bus farebox.
You do not collect benefits at the Farecards and Passes machine



Helpful Hints to Get Ready

- Separate your transit from parking benefits
- Decide how to treat unused employee benefits
 - Rollover in employee's benefit account
 - Credit back to employer
- ALL SmarTrip® cards MUST be registered
- Review and update account contact information
- Move van pool, MARC, VRE and MetroAccess employees to electronic SmartBenefits®



SmartBenefits® AnyTime

- Assign benefits after the standard cutoff date
- Employees may immediately claim transit benefit
- Benefits
 - Eliminates 45-day waiting period
 - Provide benefits to interns
 - Provide Official Travel funds



Thank You



Questions and Answers

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